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Germany

Wine

Marketing Annual

2002

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Report Highlights:
German wine consumption continues to grow. Per capita consumption of wine including sparkling wine in CY 2001 amounted to 23.9 liters versus 23.1 liters in CY 2000. German consumers increasingly favor red wines which already make up 59 percent of the wine market. U.S. suppliers have taken advantage of this trend, increasing their sales significantly over the past five years. In CY 2001, Germany imported 250 million hectoliters of wines from the U.S. at a total value of $U.S.62 million. During the first eight months of CY 2002, imports of U.S. wines rose by about 15 percent. Domestic production of wine is forecast to grow by about 20 percent in 2002. Initial reports estimate 2002 will be a good wine year for Germany.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
Berlin [GM1], GM

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Executive Summary

On an area of 103,605 hectares, German vintners are expected to harvest 11.0 million hectoliters (hl) of grape must in 2002, 20 percent more than in 2001. First indications are that the must quality is at or above average. Due to climate and geography, German wine production can vary significantly in quality and quantity from year to year. However, strict maximum harvest regulations based on the EU wine regime should limit fluctuations in annual production. About 71 percent of the wines are white wines. Following the general consumer trends, German vintners again increased their red wine area to now 29 percent. Germany had been traditionally known as a white wine region with less than 20 percent of area planted in red wine varieties. About 50 percent of the re-plantings are currently in red wine varieties. Based on area, Germany is the fifteenth largest wine grape producing country in the world and rank six in 2000 in terms of wine production.

Total calculated wine consumption in MY 2000/2001 (Sep/Aug) is estimated at 19.7 million hl, 52 percent sourced from imports. Germany is actually the world’s biggest importer of wine, predominantly from other EU countries. U.S. exports of mostly high quality red wines are growing steadily. Total U.S. wine shipments to Germany amounted to 250,200 hl in CY 2001 compared to 239,500 hl in 2000. Due to the strengthening of the Euro versus the dollar, U.S. wine exports to Germany continue to grow in 2002. However, U.S. wines continue to face strong competition from other New World wines from Australia, New Zealand, Chile, Argentina and

South Africa.

Germany exported about 2.37 million hl of wine in CY 2001, mainly to other EU countries. However, about 6 percent of German exports are to the United States, or 141,600 hl. In its export markets, Germany is strongly promoting Riesling for the medium and higher price wine segments. The German Wine Institute spent about Euro 3.67 million ($3.29 million) in export promotions in CY 2001

Note: In recent years the U.S.$/EURO exchange rate has been as follows:

1997: $1 = EURO 0.8870	2000: $1 = EURO 1.0827
1998: $1 = EURO 0.8990	2001: $1 = EURO 1.1166
1999: $1 = EURO 0.9383	Sep 2002: $1 = EURO 1.0196

Production

In the fall of 2002, German vintners harvested about 11.0 million hectoliters of grape must which represents a normal crop. The 2001 harvest had been below average at 9.2 million hectoliters. Due to sunny weather in September and early October, there is a good possibility for average to above average quality wine.

Germany is the EU's 6th largest wine producing region with 104,000 hectares under wine grape cultivation but also the world's 6th biggest wine producer with an annual production of around ten million hectoliters. Its production area is divided into 12 different growing regions. The names of these regions are used for region of origin labeling. The commercial production of wine outside of the designated regions is not permitted. Based on the rules of the EU wine regime, the German wine law allows regional authorities to stipulate which grape varieties can be produced in the production regions. In 2001, 71 percent of grapes produced in Germany are of white wine varieties. The leading Riesling and Mueller-Thurgau varieties are grown on about 39 percent of the grape area. Of growing popularity are White Burgundy, Chardonnay and Rulaender grapes with the largest decrease in the Mueller-Thurgau variety. Red wine is only planted in about 29 percent of the grape area, but its production area is growing by about 1,500 to 2,500 hectares every year. The most favored red grape varieties are Blue Burgundy, Dornfelder, and Blue Portugese. For replantings, the most favored grape during the past five years was the Dornfelder variety (see Table 3.)

To assist vintners to better meet consumer demand, the EU offers a restructuring program for vineyards. During MY 2001/02 (Sep/Aug) the EU subsidized in Germany the unrooting of unwanted grape varieties and subsequent replanting with modern varieties valued at Euro 13.78 million (U.S.$ 12.34 million). The program is also offered in other EU countries. Under this program, a total of 2,280 ha were replanted with new grape varieties other than Mueller-Thurgau, Kerner, Bacchus, Morio-Muskat or other high yielding varieties which are of little interest to the consumer. Also, subsidized replanting with the high yielding red Dornfelder variety was stopped in MY 2001/02 since this could risk meeting maximum yield limits stipulated by production region and quality level. In MY 2000/2001, the EU provided Euro 12.61 million (U.S.$ 11.65 million) for the restructuring of 1,624 hectares of grape area in Germany. The total annual replanting rate is estimated at about 4 percent since plants are kept in production for 20 to 25 years.

As a result of the large grape harvest in 1999, German wine prices dropped to record lows during the past three years. However, this price drop mainly affected bulk white wine producers, about 40 percent of the production. For example, prices for bulk wines of less favored white varieties dropped to extreme lows of EUR 16 per hl while prices for bulk Dornfelder (red) are recorded at EUR 165 to EUR 180. Direct marketing vintners do not seem to face such low prices - growing grapes is simple, but making and marketing a good wine is a science. Producers of white bulk wine also seem to have problems selling their product to mass producers of sparkling wines. These companies still prefer to import their raw wine from low-priced Mediterranean and eastern European sources. The disadvantages faced by domestic vintners are their small operation size and consequent inability to offer large volume. The majority of the bulk wines are purchased by mass bottlers for sales in discount stores.

In 2002, Germany lifted the irrigation ban now allowing vintners to irrigate their vineyards for the production of quality wines of special production regions which represents the lower end of quality wines. Because of maximum harvest limitations irrigation is not permitted in higher quality wine production. Also, the concentration of wine must has been approved by German wine law in 2002.

About two percent of the German wine production is organic. This special market niche is expected to grow steadily over the near future.

Consumption

The economic situation in Germany worsened considerably during the past year. Economic growth for 2002 is expected at a low of 0.5 percent or even lower and an economic turn-around is currently not in sight. Budget deficits are rising and the government proposes to eliminate granted tax breaks and effectively increase the tax burden and the contributions to the social welfare system. These are all factors which do not stimulate consumer spending. In addition, following the introduction of the Euro, many consumers felt insecure dealing with the new currency and reduced their spending particularly in the catering and restaurant business. Consequently, hotel and restaurant receipts during the first nine months of 2002 dropped by 3.1 percent. The outlook for 2003 is also pessimistic. Unfortunately, many restaurant owners are accused of having used the switch from the Deutsche Mark to the Euro as a chance to increase their prices considerably.

However, German wine consumption has been growing over the past four years while demand for all other alcoholic beverages is decreasing. Wine is gaining popularity since it is a stylish positive-image product (see Table 4.) In 2001, German consumers for the first time in history spent more money on wine than on beer. Good quality combined with interestingly designed bottles and labels makes wine attractive to all alcohol beverage consuming age classes. Per capita consumption in 2001 was estimated at about 19.7 liters versus 19.0 liters in 2000. This number does not include sparkling wine, which lost about twenty percent of its consumption after the millennium. In 2001, a consumer panel revealed that 68.6 percent of the households are at least irregularly buying wine. This is a continuous increase over the past five years.

The major beneficiaries in the upward trend are red wines and other imported New World wines. As a result, the market share of German wines has actually dropped under 50 percent to 47.8 percent to the dismay of the average German vintner (Table 5). The major reason for the decline is that despite recent re-planting of red wine varieties, Germany is still predominantly a white wine producing country. Red and rose wines which cover 58.9 percent of the German wine market are predominantly coming from imported sources. By converting their vineyards to red wine varieties, German vintners intend to participate in this popular red wine trend. The big winners in the wine market, the New World wines, are generally selling at above average prices.

Some hindrances faced by the German wine industry are the fragmented production structure (about 67,000 vineyards) and the complicated German wine grading and labeling system, which is not fully understood by many customers (see GAIN Report GM9069). Because of its diversified structure, the German wine industry has not been in the position to provide the increasingly concentrated retail trade with sufficient quantity of uniform types of wine. It, in particular, limits the marketing opportunities on the shelves of the large food discounters who handle about 43 percent of total wine sales in Germany; another 23 percent is sold through super markets and 17 percent are sold directly by the vintners and wine cooperatives. As result, close to 40 percent of the domestic wine production is sold directly by the producer or producer cooperative to the consumer while about 85 percent of the imported wines are marketed through food stores, discounters and super markets**.** Only 7 percent of imported wines are traded by specialized stores and 5.5 percent are sold through restaurants and hotels.

To better position domestic wines on the retail shelves, the German Wine Institute has developed two new wine categories, ‘Classic’ and ‘Selection’ type wines (see GAIN Report GM0041). Vintners contract with the German Wine Institute for the use of the Classic and Selection label. The German Wine Institute controls the production methods and the quality of the wine sold under this label. In 2001, the first Classic type wines were put on the market, somewhere around 20,000 to 30,000 hl. For CY 2002, an increase to more than 120,000 hectoliters is expected. The Classic line specifically aims to improve the quality of bulk wine and in the longer term the image of German wines. The target price range for Classic wines is between EUR 3.50 and EUR 5.00 per bottle of 0.75 liters. The target price for Selection wines is between EUR 7.50 and EUR 10.00. The German Wine Institute claims that the retail trade is strongly interested in the Classic line. However, the target is not only the domestic market, the Germans also intend to promote the Classic and Selection label in their export markets.

While, the trend line for wine consumption during the first half of 2002 still pointed upward, a closer look tells us that consumers switched from higher price purchasing locations to low priced food discount chains. By the end of 2002, wine consumption is likely to be down by about five percent compared to 2001. Total spending for wine dropped by 2.3 percent during the first half of 2002 versus the same period in 2001. The decline was much stronger in eastern Germany where average incomes are lower than in western Germany. Monthly data show that spending on wine steadily declined over the past several months namely in the more affluent western part of the country. Average prices for domestic wines remained relatively high while prices for all imported wines dropped by about 10 percent. Imported wines are increasingly marketed through low priced food discount chains. Average wine prices at the leading discounter ‘Aldi’ are reported at EUR 2.65/liter for imported wines and EUR 2.18/liter domestic wines for 2001. At special wine stores, prices are significantly higher at EUR 6.19 and EUR 5.26, respectively. Vintners and cooperatives sell their wines at about 20 percent below the prices in specialized stores.

With respect to taste, German consumer preference for dry and semi-dry wines is steadily growing. Data for CY 2000 indicate that 54.4 percent of the German quality label wines were of the dry/semi-dry market segment, compared to 35.9 percent fifteen years before.

Favorite bottling size for Germany is the 0.75 liter bottle. Wines sold in one liter bottles are often of the lower price segment or sold directly through the vintners. About 94 percent of German wines are in glass bottles, of which about 27 percent are returnable. The industry has recently looked into packaging alternatives for glass bottles and also tested PET (plastic) bottles but came to the result that PET is not a packaging alternative for wine in Germany. For non-alcoholic drinks, PET bottles have become extremely popular.

Sparkling wine consumption in Germany reached a high in 1999 due to the millennium celebration. Demand for sparkling wine, including champagne, has fallen to 4.2 liters per capita in 2001. Reports for 2002 show that consumers are increasingly interested in the higher priced market sparkling wine segment but total consumption volume did not recover.

Trade

Germany is the world's most important import market for wine. More than 50 percent of Germany's wine consumption is of imported wine. Total imports in CY 2001 dropped by 7 percent in the last year to 11.3 million hl. During the first eight months of 2002, German wine imports grew by five percent. According to official German trade statistics, in CY 2001, largest declines in exports were made by Italian and French wines with negative 16 percent and negative 6 percent, respectively. In 2002, Italian wines were able to regain 12 percent market shares while French wine shipments remained stable. Other winners in the German market are Austrian wines with an increase of 75 percent and Portugese wines were up by about 30 percent. Average imported Austrian wines sell at about one third of Portugese wines. Imports from very low priced wine countries such as Bulgaria, Macedonia, Slovenia, Hungary and Romania dropped by 7 percent in 2002. These five countries exported a bit more than one million hectoliters of wine to Germany in 2001. However, they primarily supply the low price end of the market with relatively sweet wines.

The winners in the market during the past several years are the New World wines from the United States, Australia, Chile, Argentina and South Africa. However, the total market share of these 5 countries still remains at only about 3 percent. California and other New World wines have captured space on many of the retail shelves. They are no longer exotic products. Most important, they are selling at above average prices (except for Chile) and are of wine varieties that are popular with German consumers. About 80 percent of the imported U.S. wines are red wines, of mostly high quality. While U.S. red wine shipments to Germany make up 6 percent of total red wine import volume, the value of these imports adds up to 13.5 percent. German consumers expect high quality when they purchase California wines. Total U.S. wine exports to Germany amounted to 250,200 hl in CY 2001; further strong growth of about 15 percent is reported for 2002 (see Table 7 ff.).

German wine exports amount to 20 to 25 percent of domestic production. In 2001, these were 2.37 million hl. The leading markets are the United Kingdom and the Netherlands followed by the United States. Germany is working hard to improved its image as a supplier of quality wines. The export marketing focus is on dry Riesling wine. The German Wine Institute spends about EUR 3.5 million annually for export promotions.

Stocks

German wine stocks had built up to 16.6 million hl by the end of July 2001 due to relatively large grape harvests in 1999 and 2000. This stock level represents about 165 percent of a regular German harvest or about 85 percent of German annual consumption of wines. During MY 2000/01 (August/July) increases are reported mainly for red wines because of the growing consumer preference for red wine. However, largest stocks are held in quality white wines at 8.1 mil hl. Extreme low bulk wine prices indicate that stocks are still far too high. In MY 2000/01, German vintners sold 307,000 hl of wine into the EU distillation program for drinking alcohol. Another 179,000 hl were distilled for industrial purposes under an EU emergency distilling program. In MY 2001/02 only 35,600 hl were distilled into drinking alcohol. A new emergency distilling program is currently not being discussed in Germany.

Policy

The issue of mutual recognition of enological practices is being intensively discussed by the German wine making industry. The hardliners argue that the EU should stick to their approved and traditional practices as laid down in the EU wine regime but there are also signs of compromise. Since the EU exports far more wine than they import, there is some recognition that a compromise may be economically necessary. Another important area of interest for European wine makers is the protection of regional names which is currently discussed between EU and U.S. negotiators. The use of oak chips instead of oak barrels is controversially discussed among German vintners. Traditional vintners claim that the production of wine in oak barrels costs about U.S.$ three, more than the use of oak chip in steel tanks.

Marketing

California wines have an excellent reputation in the German market and so far the consumers seem to be willing to pay an above average price. Other American wine growing regions should incresingly test the German market and take advantage of the good California reputation. California wines have been very successful during recent years. Since they are no longer a novelty in the German market, growth rates are likely to level off. They have to compete intensively with other New World wines, in particular wines from Chile, South Africa and Australia which also have a good quality reputation. Also high quality wines from Romania and Bulgaria are foreseen to conquer the German market within the coming years. However, their great disadvantage is their image as low priced products.

Generic marketing for the German wine industry is conducted by the German Wine Institute, charged with marketing and promoting the quality of German wine within Germany and around the world. It receives most of its funds as royalties from German wine growers and processors. Overall, the German wine marketing aims to improve the image of German wine, and promote German wine in the high and medium priced market segments. These promotional efforts have the potential to also generically support marketing opportunities of imported high quality wines. Promotional efforts are particularly targeting the lucrative medium-price segment of the wine market (between $5 and $9 per bottle), a segment in which German wines are under represented. Besides the traditional export markets in Europe, North America and Japan, new markets in Eastern Europe, South America and Asia are also targeted.

For marketing domestic wines, quality seals and wine awards are a very helpful and efficient tool in wine marketing. Consumers feel confident when they identify such seals such as a golden or silver plaque of the Chamber of Agriculture or DLG quality seal (DLG = Deutsche Landwirtschaftsgesellschaft).

Helpful addresses for marketing wines in Germany and for general information about the German wine market are

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Tel.: +49 611 9200 736

Fax: +49 611 9200 263
wineinstitute@weyrich-pr.de

Deutsches Weininstitut
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Gutenbergplatz 3-5
55006 Mainz, Germany
Tel.: +49 6131 2829 0
Fax +49 6131 2829 20
info@dwi-dwf.de
(info material only in German language)

The major international trade show for wine in Germany is the ProWein, held annually in spring in Duesseldorf. Next show: March 23-25, 2003. ProWein is an excellent opportunity to meet importers, wholesalers, wine buyers, and media contacts; and to taste-test your wine against the competition. In addition to individual U.S. exhibitors, California has a large Pavilion; also, a MIATCO organized Mid-West Wine Pavilion has become increasingly popular in recent years. Visiting ProWein would be a first step for U.S. exporters to market their wines in Germany; however, exhibiting at the show is more effective because it gives trade visitors a point of contact for questions and provides an opportunity to taste the wines. The next step would be wine tastings for wine buyers in various German cities.

ProWein - International Trade Fair Wines and Spirits
Messe Duesseldorf GmbH
Stockumer Kirchstrasse 61
40474 Duesseldorf, Germany
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Statistical Section

Table 1: German Wine Production by Type and Quality, in 1,000 hl						
Calender Year	1996	1997	1998	1999	2000	2001
White Wine	6,749	6,481	7,936	9,042	6,819	6,071
Table Wine	171	244	503	1,354	708	359
Quality Wine	4,670	2,953	5,111	4,648	3,984	3,545
Quality Wine w/ Spec. Attributes**	1,907	3,282	2,323	3,040	2,127	2,166
Red Wine	1,842	1,829	2,684	3,081	3,032	2,820
Table Wine	8	9	26	33	69	25
Quality Wine	1,693	1,422	2,436	2,706	2,736	2,539
Quality Wine w/ Spec. Attributes	140	397	222	342	227	256
Total Wine	8,591	8,310	10,620	12,123	9,852	8,891
Table Wine	179	254	529	1,387	777	384
Quality Wine	6,364	4,376	7,547	7,354	6,720	6,085
Quality Wine w/ Spec. Attributes	2,047	3,680	2,545	3,382	2,355	2,422
* Preliminary						
** Quality attributes shown on the label						
Source: German Wine Growers' Association						

Table 2: 'German Grape Most Production by Type and Quality, in 1,000 hl						
Calender Year	1997	1998	1999	2000	2001	2002*
White Wine	6,614	8,091	9,119	7,005	6,240	7,500
Red Wine	1,881	2,742	3,167	3,076	2,841	3,500
Total Wine	8,494	10,834	12,286	10,081	9,081	11,000
* Forecast						
Source: German Wine Growers' Association						

Table 3: Grape Variety Distribution, 1,000 hectares						
	1991	1997	1998	1999	2000	2001
White Varieties	85,392	82,186	80,853	79,081	77,525	73,882
Riesling	22,013	22,774	22,631	22,355	22,118	21,514
Mueller-Thurgau	24,600	22,069	21,252	20,672	20,023	18,609
Silvaner	7,585	7,188	7,018	6,859	6,691	6,422
Kerner	7,667	7,263	7,011	6,828	6,543	6,054
Bacchus	3,490	3,396	3,316	3,282	3,209	2,967
Rulaender	2,509	2,538	2,565	2,637	2,769	2,905
Scheurebe	3,781	3,418	3,284	3,126	2,948	2,693
White Burgundy	1,282	2,029	2,165	2,396	2,593	2,795
Chardonnay			467	531	610	719
other white	12,465	11,511	11,144	10,936	10,021	9,204
Red Varieties	18,385	22,057	23,540	25,152	27,245	29,723
Blue Burgundy	6,449	7,745	8,204	8,643	9,255	9,806
Dornfelder	1,509	2,599	3,218	3,765	4,372	5,530
Blue Portogese	4,320	4,660	4,718	4,878	5,026	5,039
Trollinger	2,439	2,547	2,551	2,530	2,593	2,615
Black Riesling	1,987	2,187	2,228	2,289	2,405	2,481
other red	1,681	2,319	2,621	3,047	3,594	4,252
Total	103,777	104,243	104,393	104,233	104,770	103,605
Source: German Wine Growers' Association						

Table 4: Wine Market Developments in Germany							
	Unit	1997	1998	1999	2000	2001	2002
Wine Consuming Households	%	63.0	66.5	66.5	68.5	68.6	
Market Share							
- German Wine	%	51.8	49.1	49.7	48.7	47.8	
- Import Wine	%	48.2	50.9	50.3	51.3	52.2	
- White Wine	%	48.8	47.8	46.7	43.3	41.1	
- Red + Rosee Wine	%	51.2	52.2	53.3	56.7	58.9	
- Wine in 0.75 l Bottles	%	48.3	49.1	51.1	52.2	51.8	
- German Wine in 0.75 l Bottles	%	36.8	40.4	44.5	43.0	45.0	
Average Prices							
- All Wine	EUR/l	3.02	2.97	3.10	3.11	3.21	
- German Wine	EUR/l	3.27	3.35	3.35	3.32	3.48	
- Imported Wine	EUR/l			2.85	2.92		
- White Wine	EUR/l	3.00	2.86	2.92	2.92	3.05	
- Red Wine	EUR/l			3.32	3.36		
Trade Chanels							
- Vintners + Coops	%	20.8	19.5	19.3	18.7	19.0	17.0
- Super Markets	%	23.3	23.4	24.2	23.9	22.9	23.0
- Speciality Stores	%	7.7	6.3	7.4	7.2	5.6	6.0
- Discount Stores	%	30.8	35.3	35.8	37.2	39.0	43.0
- other	%	17.4	15.5	13.3	13.0	13.5	11.0
Source: German Wine Institute, Annual Report							

Table 5: German Beverage Consumption, Liter per Capita						
	1996	1997	1998	1999	2000	2001
Alcoholic Beverage	161.3	160.3	156.3	156.3	154.4	152.8
- Beer	131.9	131.2	127.5	127.5	125.5	123.1
- Wine	18.3	18.1	18.1	18.0	19.0	19.7
- Sparkling Wine	4.8	4.9	4.7	4.9	4.1	4.2
- Spirits	6.3	6.1	6.0	5.9	5.8	5.8
Non-alcoholic Bev.	230.9	239.9	240.7	248.3	254.0	256.7
- Mineral Water	97.0	100.0	100.1	104.2	107.7	110.2
- Soft Drinks	92.7	98.7	99.6	103.7	105.7	106.2
- Fruit Juice	41.2	41.2	41.0	40.4	40.6	40.3
Hot Drinks + Other	278.7	273.3	275.1	277.3	275.8	276.6
- Coffee	163.5	160.0	159.1	159.4	158.9	159.2
- Coffee Substitute	3.3	3.4	3.2	3.0	3.0	3
- Black Tea	24.7	24.8	27.1	28.2	26.7	26.2
- Milk	87.2	85.1	85.7	86.7	87.2	88.2
Grand Total	670.9	673.5	672.1	681.9	684.2	686.1
Source: Ifo Institut Muenchen - Weinbauverband - Zahlen, Daten, Fakten						

Table 6: German Wine PS+D - 1,000hl - 8/1/2000 - 7/31/2001				
	Total	German Wine	Imported Wine	Sparkling Wine
Beg.Stocks	17,846	12,244	2,277	3,325
Production	9,950	9,410	-	540
Imports	11,616	-	8,910	2,706
Total Supply	39,412	21,654	11,187	6,571
Exports	2,569	2,011	425	133
Processing	607	487	120	-
Dom Wine Cons	19,661	7,336	8,847	3,478
Ending Stocks	16,575	11,820	1,795	2,960
Total Distrib	39,412	21,654	11,187	6,571
Per Capita Cons	23.9	8.9	10.8	4.2
%Change vs				
MY 1999/00	0.2	2.9	4.0	(12.9)
Wine Cons 99/00	19,622	7,127	8,504	3,991
Source: German Vintners' Association				

Table 7: German Imports of Wine, 1,000 hl, Million Euro								
	1999		2000		2001		Jan/Aug 2002	
Quality White Wine	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro
Total	1,011.9	217.4	1,079.2	224.2	952.4	198.7	663.9	126.4
Intra-EU	1,011.8	217.4	1,078.7	224.1	948.9	198.0	663.8	126.4
Extra-EU	0.0	0.0	0.5	0.1	3.5	0.7	0.1	0.0
United States	0.0	0.0	0.2	0.0	0.1	0.0	0.0	0.0
Other White Wine								
Total	3,849.0	237.5	3,408.0	220.3	2,768.7	196.3	2,228.6	139.2
Intra-EU	3,461.4	186.8	2,994.0	158.4	2,325.6	139.7	1,927.3	102.0
Extra-EU	387.6	50.8	414.1	61.9	443.1	56.6	301.3	37.3
United States	29.7	8.6	32.5	10.0	37.1	9.1	40.5	7.8
Quality Red Wine								
Total	2,414.0	629.8	2,535.0	634.0	2,294.1	581.4	1,364.8	343.9
Intra-EU	2,414.0	629.7	2,534.6	633.9	2,291.6	580.6	1,364.8	343.9
Extra-EU	0.0	0.0	0.3	0.1	2.5	0.7	0.0	0.0
United States	0.0	0.0	0.0	0.0	1.7	0.5	0.0	0.0
Other Red Wine								
Total	3,551.2	370.4	3,702.1	424.1	3,715.4	436.4	2,612.5	280.4
Intra-EU	2,286.4	206.7	2,175.0	201.9	2,082.9	214.1	1,444.6	138.7
Extra-EU	1,264.8	163.7	1,527.1	222.2	1,632.5	222.3	1,167.8	141.7
United States	116.9	37.9	206.6	65.6	210.9	58.9	162.9	37.3

Table 7 con't: German Imports of Wine, 1,000 hl, Million Euro								
	1999		2000		2001		Jan/Aug 2002	
Vermouth	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro
Total	517.4	33.8	580.4	27.7	481.0	22.8	327.4	14.5
Intra-EU	283.9	26.1	371.6	21.0	310.1	17.4	240.4	12.0
Extra-EU	233.5	7.7	208.8	6.7	170.8	5.4	87.0	2.5
United States	0.0	0.0	0.0	0.0	0.3	0.0	0.1	0.0
Wine Cooler								
Total	208.3	15.5	130.0	11.8	244.9	13.5	174.5	10.7
Intra-EU	196.7	12.3	119.3	9.0	233.3	11.0	168.0	9.3
Extra-EU	11.6	3.3	10.7	2.8	11.7	2.4	6.5	1.4
United States	3.0	0.9	2.5	0.7	1.3	0.3	1.1	0.3
Liquor/Wine Spirits								
Total	150.7	30.4	133.7	26.8	148.3	31.1	118.8	24.6
Intra-EU	150.0	30.1	132.5	26.4	146.8	30.3	118.0	24.2
Extra-EU	0.9	0.3	1.1	0.4	1.5	0.9	0.9	0.4
United States	0.0	0.1	0.3	0.1	0.3	0.4	0.1	0.2
Sparkling Wine / Base Wine for Sparkling Wine								
Total	1,393.5	472.0	1,270.0	401.2	1,388.8	408.0	813.1	207.1
Intra-EU	1,375.0	466.0	1,246.2	393.1	1,371.4	402.3	807.3	205.4
Extra-EU	18.5	6.0	23.7	8.1	17.4	5.7	5.8	1.7
United States	0.0	0.1	0.1	0.1	0.1	0.1	0.0	0.0
Total Wine								
Total	13,096.0	2,006.8	12,838.2	1,970.2	11,993.7	1,888.2	8,303.6	1,146.9
Intra-EU	11,179.0	1,775.0	1,065.2	1,667.8	9,710.5	1,593.5	6,734.2	961.9
Extra-EU	1,917.1	231.8	2,186.3	302.5	2,283.2	294.7	1,569.4	185.0
United States	149.8	47.6	242.0	77.0	251.8	69.4	204.6	45.7
Source: Federal Statistics Office								

Table 8: German Exports of Wine, 1,000 hl, Million DM								
	1999		2000		2001		Jan/Aug 2002	
Quality White Wine	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro
Total	1,426.6	245.7	1,521.9	230.8	1,416.7	225.7	847.2	140.0
Intra-EU	1,023.5	141.6	1,132.7	127.7	1,013.6	122.5	594.0	70.6
Extra-EU	401.8	103.0	387.8	101.7	401.9	101.9	252.0	68.4
United States	107.9	30.0	125.5	36.8	130.0	38.4	86.1	26.6
Other White Wine								
Total	520.5	49.9	522.4	45.8	459.4	44.5	296.3	30.3
Intra-EU	484.2	44.7	468.3	39.0	401.3	36.1	257.6	24.3
Extra-EU	35.8	4.9	53.9	6.6	57.8	8.2	38.6	5.9
United States	1.6	0.3	1.2	0.3	1.6	0.3	0.8	0.2
Quality Red Wine								
Total	54.1	29.3	74.8	40.4	104.1	39.2	60.8	24.9
Intra-EU	28.6	17.2	37.2	22.6	61.9	21.7	32.5	13.0
Extra-EU	24.0	10.4	36.2	15.9	40.9	15.7	27.3	10.6
United States	1.6	1.0	2.7	1.5	2.8	1.4	2.3	1.3
Other Red Wine								
Total	143.9	22.3	192.7	31.8	234.4	38.7	181.2	32.0
Intra-EU	109.4	14.4	148.5	21.4	171.4	25.5	130.1	21.4
Extra-EU	34.1	7.6	43.5	9.8	62.4	12.8	50.6	10.3
United States	3.0	0.6	3.3	0.8	2.2	0.6	2.1	0.7

Table 8 con't: German Exports of Wine, 1,000 hl, Million DM								
	1999		2000		2001		Jan/Aug 2002	
Vermouth	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro
Total	138.7	14.6	124.8	13.2	112.3	12.4	825.4	9.2
Intra-EU	127.3	12.4	107.1	9.7	94.6	8.4	71.5	6.2
Extra-EU	10.6	1.8	16.7	3.0	16.6	3.5	10.3	2.6
United States	1.2	0.2	1.6	0.2	1.0	0.2	0.7	0.1
Wine Cooler								
Total	168.7	19.9	151.5	17.9	136.7	16.0	1,068.0	10.5
Intra-EU	132.9	16.1	119.3	12.9	111.3	12.1	88.6	7.9
Extra-EU	35.7	3.8	32.0	5.0	25.4	3.9	18.1	2.6
United States	0.3	0.1	0.4	0.2	0.4	0.1	0.2	0.1
Liquor/Wine Spirits								
Total	17.5	5.8	15.8	5.4	21.5	7.0	13.0	4.0
Intra-EU	16.5	5.3	15.0	4.9	20.4	6.2	12.4	3.6
Extra-EU	0.6	0.3	0.6	0.3	0.8	0.4	0.4	0.3
United States	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.1
Sparkling Wine / Base Wine for Sparkling Wine								
Total	171.7	64.6	146.8	39.5	135.4	42.8	70.3	25.6
Intra-EU	115.7	44.2	94.7	22.5	90.9	26.0	48.5	15.9
Extra-EU	54.4	17.7	50.7	14.7	43.2	14.3	20.9	8.1
United States	5.0	3.1	5.5	1.8	5.2	1.4	2.4	0.8
Total Wine								
Total	2,641.6	452.2	2,750.8	424.9	2,620.6	426.5	1,658.1	276.4
Intra-EU	2,038.1	295.7	2,123.0	260.7	1,965.4	258.7	1,235.3	162.9
Extra-EU	597.1	149.5	621.3	156.9	649.1	160.7	418.2	108.7
United States	120.5	35.2	140.4	41.6	143.1	42.5	94.7	29.8
Source: Federal Statistics Office								

Table 9: German Wine Imports by Country of Origin								
	1999		2000		2001*		Jan/Aug 2002	
	1,000 hl	Mill. $	1,000 hl	Mill. $	1,000 hl	Mill. $	1,000 hl	Mill. $
U.S.A.	146.8	49.8	239.5	70.4	250.2	61.9	203.4	41.5
Italy	5,835.1	741.1	5,428.2	601.7	4,556.4	564.0	3,313.0	380.2
France	2,991.1	753.2	2,698.0	570.6	2,544.5	518.2	1,631.9	290.3
Spain	1,302.9	272.2	1,388.0	262.1	1,531.0	250.7	890.2	142.5
Greece	228.6	35.1	241.6	31.9	202.0	25.6	134.8	19.2
Austria	229.9	24.3	277.0	22.7	224.7	20.3	255.9	16.1
Hungary	201.4	20.9	246.2	22.6	185.5	16.2	128.1	10.9
Romania	157.9	11.9	132.3	7.8	198.3	10.9	120.4	6.4
Bulgaria	212.0	18.3	196.1	13.4	201.0	13.0	102.5	7.3
Mazedonia	415.7	21.3	476.8	18.8	461.1	16.6	410.0	14.8
Tunesia	57.5	4.0	53.0	3.0	34.5	2.0	14.2	0.8
Chile	170.8	36.6	213.2	42.8	329.5	47.8	207.8	26.5
South Africa	91.4	20.5	135.0	27.9	121.3	25.0	94.5	18.5
Portugal	108.5	24.3	119.3	22.3	97.6	20.7	81.9	14.7
Argentina	36.9	6.5	43.5	8.1	39.6	6.7	23.7	4.3
Australia	79.7	24.6	129.9	34.4	138.3	35.9	79.3	23.1
Other	104.3	21.6	110.2	22.6	152.4	23.1	110.1	15.4
World	12,370.4	2,086.3	12,127.8	1,783.2	11,267.9	1,658.6	7,801.7	1,032.5
* Preliminary								
Source: Federal Statistics Office								

Table 10: German Wine Exports by Major Countries of Destination										
	1998		1999		2000		2001*		Jan/Aug 2002	
	1,000 hl	Mill. $	1,000 hl	Mill. $	1,000 hl	Mill. $	1,000 hl	Mill. $	1,000 hl	Mill. $
U.S.A.	109.3	34.3	119.1	37.2	138.3	38.0	141.6	37.8	93.8	27.4
Great Britain	1,003.2	158.4	999.2	140.8	1,029.9	108.1	929.4	99.5	539.1	61.7
Netherlands	297.5	48.7	276.2	47.9	291.1	34.4	285.5	32.1	180.4	21.5
Sweden	99.4	17.9	101.5	18.5	120.3	18.4	120.4	17.5	88.9	13.4
Japan	195.7	62.4	153.1	51.8	118.0	35.2	101.5	29.9	62.7	18.3
France	73.9	15.9	93.6	19.0	154.9	16.4	104.5	17.9	70.0	11.8
Bel/Lux	134.7	20.6	81.7	18.4	80.6	10.2	95.1	12.9	51.5	6.5
Denmark	103.1	12.5	88.0	10.1	81.6	7.3	73.7	6.6	46.8	3.8
Austria	63.2	13.0	60.1	17.3	56.7	11.7	54.9	11.2	29.8	7.4
Canada	48.7	11.6	49.3	12.1	50.4	11.6	45.8	11.1	30.9	8.2
Ireland	30.4	4.9	27.5	3.9	18.6	2.3	21.4	3.2	16.9	2.5
Poland	24.1	4.0	27.2	4.7	30.4	4.3	35.3	4.5	19.7	3.0
Norway	41.2	8	44.0	8.3	43.5	7.0	45.6	7.5	40.5	7.1
Switzerland	15.1	6.1	14.0	7.7	14.6	8.8	17.0	8.5	13.6	6.4
Latvia	6.8	1.1	9.2	3.5	22.2	5.8	39.3	7.4	28.7	4.9
Other	278.0	59.8	190.5	44.2	223.3	43.9	260.5	48.8	155.4	33.1
World	2,524.3	479.2	2,334.2	445.3	2,474.4	363.6	2,371.5	356.4	1,468.7	237.0
* preliminary data										
Source: Federal Statistics Office										

Table 11: Average Prices for Imported Wine								
	1999		2000		2001*		Jan/Aug 2002	
	Euro/L	$/L	Euro/L	$/L	Euro/L	$/L	Euro/L	$/L
	Quality White Wine							
WORLD	2.14	2.29	2.08	1.92	2.09	1.87	1.88	1.73
U.S.A.	33.23	35.42	3.25	3.00	3.00	2.69	-	-
INTRA-EU-15	2.15	2.29	2.08	1.92	2.09	1.87	1.88	1.73
CHILE	-	-	1.92	1.77	-	-	-	-
SOUTH AFRICA	5.11	5.44	7.67	7.05	-	-	-	-
	Other White Wine							
WORLD	0.62	0.66	0.64	0.59	0.71	0.63	0.63	0.58
U.S.A.	2.89	3.08	3.19	2.95	2.45	2.19	2.02	1.85
INTRA-EU-15	0.54	0.58	0.52	0.48	0.60	0.54	0.54	0.49
CHILE	2.16	2.30	2.48	2.29	1.77	1.58	1.64	1.51
SOUTH AFRICA	1.62	1.73	1.72	1.59	1.64	1.47	1.44	1.33
AUSTRALIA	2.18	2.33	2.36	2.18	2.33	2.09	2.49	2.26
	Quality Red Wine							
WORLD	2.61	2.78	2.51	2.31	2.53	2.27	2.52	2.30
U.S.A.	16.62	17.68	1.09	6.55	3.17	2.84	-	-
INTRA-EU-15	2.61	2.78	2.51	2.31	2.53	2.27	2.52	2.30
CHILE	2.92	3.11	3.09	2.86	1.97	1.77	-	-
SOUTH AFRICA	5.11	5.44	7.67	7.08	2.50	2.24	-	-
AUSTRALIA	12.78	14.98	20.50	11.80	2.73	2.45	-	-
	Other Red Wine							
WORLD	1.04	1.11	1.13	1.04	1.17	1.05	1.06	0.97
U.S.A.	3.24	3.46	3.20	2.96	2.79	2.50	2.28	2.08
INTRA-EU-15	0.91	0.96	0.92	0.85	1.03	0.92	0.96	0.88
CHILE	1.99	2.12	2.14	1.98	1.60	1.44	1.35	1.23
SOUTH AFRICA	2.46	2.63	2.57	2.37	2.71	2.42	2.64	2.42
AUSTRALIA	3.33	3.55	3.20	2.96	3.16	2.83	3.21	2.96
	Liquor Wine							
WORLD	2.02	2.15	2.06	1.90	2.10	1.88	2.26	2.05
U.S.A.	18.78	20.01	43.90	40.54	13.76	12.32	27.38	24.43
INTRA-EU-15	2.01	2.14	2.05	1.89	2.06	1.85	2.24	2.03
SOUTH AFRICA	4.99	5.32	4.52	4.17	4.70	4.21	3.64	3.40
AUSTRALIA	18.45	19.66	10.48	9.68	10.12	9.06	12.50	11.38

Table 11 con't: Average Prices for Imported Wine								
	Sparkling Wine							
WORLD	3.38	3.61	3.18	2.93	2.94	2.63	2.55	2.34
U.S.A.	7.96	8.48	10.49	9.69	9.20	8.24	12.00	11.60
INTRA-EU-15	3.39	3.61	3.17	2.93	2.93	2.63	2.55	2.34
CHILE	2.92	3.11	8.76	8.09	3.72	3.33	7.50	6.70
SOUTH AFRICA	4.47	4.77	3.80	3.51	3.68	3.30	3.08	2.80
AUSTRALIA	4.21	4.50	8.34	7.71	5.20	4.66	5.71	5.15
	Vermouth							
WORLD	0.63	0.70	0.46	0.43	0.47	0.43	0.42	0.38
U.S.A.	2.39	2.55	5.10	4.70	0.63	0.56	3.11	2.78
INTRA-EU-15	0.92	0.98	0.55	0.51	0.56	0.50	0.48	0.43
	Wine Coolers							
WORLD	0.75	0.79	0.97	0.90	0.55	0.49	0.59	0.55
U.S.A.	2.93	3.13	2.82	2.60	2.31	2.06	2.6	2.37
INTRA-EU-15	0.62	0.67	0.80	0.74	0.47	0.42	0.53	0.49
SOUTH AFRICA	15.30	16.30	1.99	1.84	2.19	1.96	1.25	1.22
* Prelimnary								
Source: Federal Statistics Office								